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Spain

Citrus

Semi-Annual

2003

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Report Highlights:

Spain's 2002/03 citrus production is estimated at around 5.8 million tons, up four percent from the previous season and six percent up from MY 2000/01. Citrus exports for 2001/02 rose to 3.8 million tons, up 8 percent from MY 2000/01. According to trade sources, Spain exported about 57,000 tons of clementines to the U.S. in MY 2002/03.

Includes PSD changes: Yes
Includes Trade Matrix: No
Semi-Annual Report
Madrid [SP1], SP

..... 1

Executive Summary 2

 Production 2

 Trade 3

 P,S&D Fresh Oranges 4

 P,S&D Fresh Tangerines 5

 P,S&D Fresh Lemons 6

Executive Summary

Production

The Ministry of Agriculture forecasts Spain's MY 2002/2003 citrus crop at about 5.8 million tons, up four percent from last year and eight percent higher than in MY 2000/01. The MY 2002/03 forecast reflects a large increase in the clementine crop, stable production for oranges and a drop in lemon output. Production increases are expected for clementines and oranges in the coming few years, while lemons are expected to decline further. Andalucia, the second citrus region in Spain, increased production by 300 percent in the last ten years and some additional increases are expected in the next few years. Murcia, the third citrus region, is also expected to increase production, perhaps by as much as 30 percent. Both regions have increased area in orchards with higher-yielding new varieties.

Spanish Citrus Production - 2002/03 (Forecast) Metric Tons

	Sweet Oranges	Tangerines	Lemons	Grapefruit	Other Citrus*	TOTAL
Valencia	1,642,000	1,603,196	306,000	5,840	0	3,557,036
Murcia	172,940	68,000	455,000	20,100	0	716,040
Andalucia	952,100	156,000	140,000	8,094	18,231	1,274,425
Catalonia	45,000	122,000	960	125	0	168,085
Balearic Is.	19,000	2,100	2,000	0	0	23,100
Others	32,880	1,015	8,400	100	0	42,395
TOTAL	2,863,920	1,952,311	912,360	34,259	18,231	5,781,081

*Bitter Oranges.

Spanish Citrus Production - 2001/2002 Metric Tons

	Sweet Oranges	Tangerines	Lemons	Grapefruit	Bitter Oranges	TOTAL
TOTAL	2,822,200	1,655,100	1,037,200	34,000	18,000	5,566,500

Cold weather ruined the quality of about 5 percent of the orange crop, mainly late varieties such as Navelina and

Valencia Late; however, clementines were little affected. Low temperatures have been helpful in controlling diseases. The stricter program to control Mediterranean fruit flies has increased the quality of clementines.

The weather has been excellent during the winter and spring for 2003/04 crop. The heavier precipitation during the past winter has been particularly welcome among farmers. They expect the MY 2003/04 oranges crop will be about average. However due to the cyclical high/low production pattern, clementine production should be down in 2003/04 while lemons should be up.

Trade

Spain's citrus exports during MY 2001/2002 totaled 3.3 million tons; some 654,000 tons were exported to non-EU countries and the balance, to the EU. Citrus imports declined in MY 2001/02. For MY 2002/03, exports of oranges have been stable, those of clementines increased, while lemons fell. According to trade sources, exports of clementines to the U.S. amounted to 57,000 tons in MY 2002/03. Spanish citrus exporters are expecting higher shipments to the new members of the EU in the next few years.

Note: \$1 = 0.91 Euros

P,S&D Fresh Oranges

PSD Table						
Country	Spain					
Commodity	Fresh Oranges					(HECTARES)(1000 TREES)(1000 MT)
	2000	Revised	2001	Estimate	2002	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		11/2000		11/2001		11/2002
Area Planted	137000	137000	140000	140000	142000	142000
Area Harvested	125000	125000	130000	130000	132000	132000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	2688	2688	2907	2822	2869	2864
Imports	180	180	169	98	170	100
TOTAL SUPPLY	2868	2868	3076	2920	3039	2964
Exports	1068	1246	1126	1504	1200	1504
Fresh Dom. Consumption	900	800	1000	751	950	770
Processing	900	822	950	665	889	690
TOTAL DISTRIBUTION	2868	2868	3076	2920	3039	2964

P,S&D Fresh Tangerines

PSD Table						
Country	Spain					
Commodity	Fresh Tangerines				(HECTARES)(1000 TREES)(1000 MT)	
	2000	Revised	2001	Estimate	2002	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		11/2000		11/2001		11/2002
Area Planted	103500	103500	104000	104000	106000	106000
Area Harvested	88000	88000	95000	95000	97000	97000
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	1780	1780	1778	1655	2005	1952
Imports	39	10	45	9	9	9
TOTAL SUPPLY	1819	1790	1823	1664	2014	1961
Exports	1106	1230	1054	1252	1250	1400
Fresh Dom. Consumption	460	250	489	205	500	230
Processing	253	310	280	207	264	331
TOTAL DISTRIBUTION	1819	1790	1823	1664	2014	1961

P,S&D Fresh Lemons

PSD Table						
Country	Spain					
Commodity	Fresh Lemons					(HECTARES)(1000 TREES)(1000 MT)
	2000	Revised	2001	Estimate	2002	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		11/2000		11/2001		11/2002
Area Planted	43500	43500	43000	43000	43000	43000
Area Harvested	42500	42500	41500	41500	41500	41500
Bearing Trees	0	0	0	0	0	0
Non-Bearing Trees	0	0	0	0	0	0
TOTAL No. Of Trees	0	0	0	0	0	0
Production	960	960	1018	1037	904	912
Imports	39	39	23	5	39	40
TOTAL SUPPLY	999	999	1041	1042	943	952
Exports	522	531	550	506	483	500
Fresh Dom. Consumption	230	200	241	200	220	200
Processing	247	268	250	336	240	252
TOTAL DISTRIBUTION	999	999	1041	1042	943	952